# NHS Blood and Transplant

Effective: 26/07/15

# **Online Blood Ordering System (OBOS)**



# This User Guide is applicable to OBOS versions numbered **7.0.x**

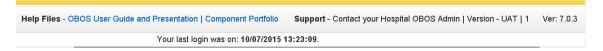
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#### Introduction. [back to top]

The on-line blood ordering system (OBOS) has been developed by NHSBT, hospitals and external suppliers to enable hospitals to order blood components on line. Orders placed in this way will go directly into the NHSBT computer system, Pulse and hospitals will be able to view the progress of their orders within NHSBT.

The OBOS "footer" includes a link to the corresponding OBOS user guide, the component portfolio and training presentation. The "footer" indicates which version of OBOS has been accessed and for which environment e.g. training, live or UAT (the user acceptance testing site). The footer also indicates the date and time of your last log in.



If you have any queries regarding use of OBOS in your hospital, please contact your hospital administrator or transfusion laboratory manager. Any feedback on this user guide can be sent to <a href="mailto:OBOS@nhsbt.nhs.uk">OBOS@nhsbt.nhs.uk</a>. Your comments will be collated and used to help improve future versions.

Please be aware of the normal functionality of the computer mouse scroll wheel. The functionality varies slightly depending on which internet browser version you are using. It is important that you do not inadvertently change a selection for any of the drop down menus using the mouse scroll wheel – please check all selections before selecting "Send order".

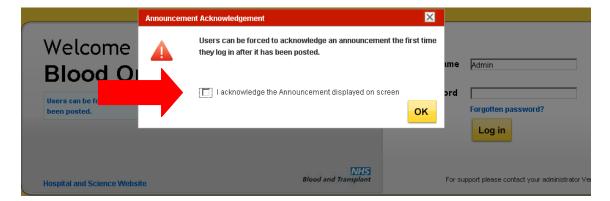
The updates to text in this new version of the User Guide have been highlighted in grey.

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# Logging onto OBOS. [back to top]

Once you have connected to the web service the log in screen shown below will appear. On the left there is an area where any announcements from NHSBT will be shown and on the right are the boxes to type in your user name and password.

NHSBT can set up announcements so that the first time a user logs in after an announcement has been posted they must acknowledge it.



Underneath the announcements area, there is a direct link to the Hospital and Science website. Clicking this link opens the site in a new window.



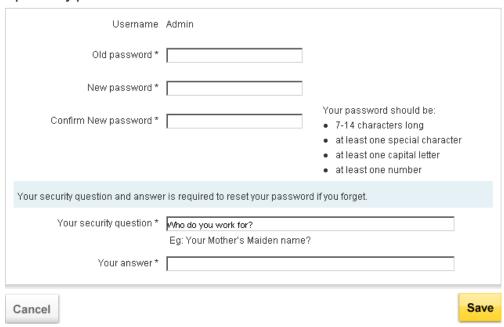
When your account is set up your user name and password will be sent to you via email. Underneath the log in area is a message about support and the version number of OBOS is displayed in the bottom right hand corner. To log on enter your username and password and click on log in.

This screen also has a link to: "Forgotten password?" (See forgotten passwords section.)

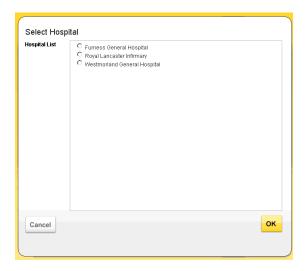
When you log onto OBOS for the first time the screen shown below will appear and you will be asked to change your password and set up a security question to allow a new password to be e-mailed to you if you forget your password. Both passwords and security question answers are case sensitive. Rules apply to passwords and these are listed on the screen. Enter your current/old password, new password twice, security question and answer and click on save.

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#### Update my password



If your account is set up for multiple hospitals you may need to select the hospital you wish to order for and click on OK as shown below.



Alternatively one hospital may have been set up as your default location in which case you will be taken straight to the home page for that hospital. Users with access to only one hospital will be taken directly to the home page.

The top line of the OBOS screens contains information on your name and the hospital you are currently viewing or placing orders for. The log off facility is also on this line. If your account allows you access to more than one hospitals site then to change the hospital you are viewing orders from or placing orders for click on change and the selection of hospitals available to you will appear. Select the correct hospital and click on OK.

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# Quick system overview. [back to top]

The homepage has four tabs for OBOS users and five tabs for OBOS administrators – the tab highlighted in yellow indicates the page you are currently viewing.

 The homepage contains order summary screens for current, draft, standing and queued orders.



 The "create order" tab has two options, the first allows you to create an order the second allows you to create a standing order.

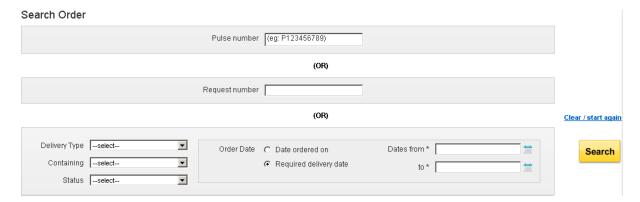


• The my "profile tab" allows you to update your profile or password

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The "search order tab" allows you to search for an order on OBOS. You can
use this function to search for orders submitted in advance that cannot be
viewed on the home page.



You can "return to search results" after viewing an individual order.



# Logging Off. [back to top]

There is an automatic 'time out' after 20 minutes. Your session will be discontinued and you will be returned to the login screen.

To log off at any time click on 'Log Off' after your name in the top left of any OBOS screen.

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# Forgotten passwords/password expiry. [back to top]

If you try to log in using the incorrect password you have four attempts, on the fifth incorrect attempt the account will be locked. The following prompts are displayed to indicate the remaining attempts. Once locked, your account can be unlocked by your hospital OBOS administrator.

Log in failed.	You have 4	attempts remai	ning.	Log in failed	. You have 3 attempts remaining.
Username	wayn000	1		Username	wayn0001
Password				Password	
	Forgotter	n password?			Forgotten password?
	Log i	n			Log in
_		npts remaining. Pl nk if you have forg		incorrect atten	our account will be locked after the 5th npt. Please try the Forgotten password link OBOS administrator for your hospital.
Username	wayn0001			Username	wayn0001
Password				Password	
	Forgotten pas	sword?			Forgotten password?
	Log in				Log in
				d. Please conta al to unlock you	
		Username	wayn0001		
		Password			
			Forgotten pa	ssword?	
			Log in		

On the log in screen "forgotten password?" appears in blue on the right hand side under the log in details boxes. If you have forgotten your password click here and the window shown below will open. Enter your username and click on 'next', your security question will appear, enter the answer and click on 're-set password and save'. A new password will be e-mailed to the e-mail address stored on the OBOS system for your username. If you cannot remember your security question and answer you will need to contact **your** hospital administrator to re-set your password.

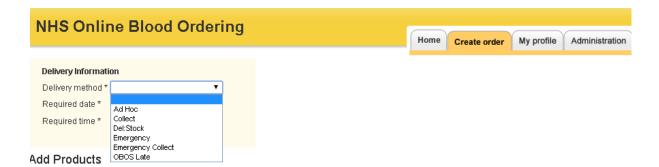


OBOS passwords require changing every 90 days. OBOS users will receive a reminder email 10 days before the password expires on live. If the password is left unchanged, a further reminder will be sent at 5 days. If the deadline for the password change is missed, OBOS can still be accessed using the old password. However, OBOS will prompt a password change before the user can progress to the home screen.

# Placing an order using OBOS [back to top]

From the home screen select the create order option to view the screen shown below.

From the drop down list select the required delivery method. The default is set as >blank<. **Del Stock** is the code for a routine delivery, **Ad hoc** for an additional non scheduled delivery. **Collect** for collection from NHSBT, **Emergency collect** is only used by a few Trusts; the majority will use NHSBT blue light service for emergency deliveries and these are selected using the **Emergency** delivery method.

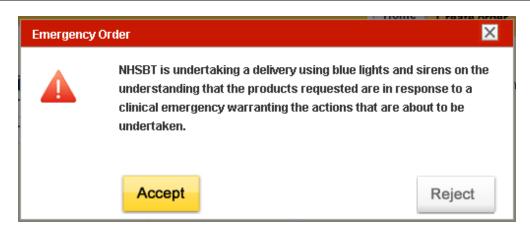


If you request an emergency (blue light) delivery, a pop up box will appear, stating:

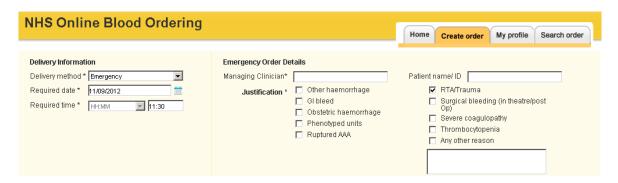
"NHSBT is undertaking a delivery using blue lights and sirens on the understanding that the products requested are in response to a clinical emergency warranting the actions that are about to be undertaken."

Select "Accept" if you want to proceed with an emergency (blue light) request.

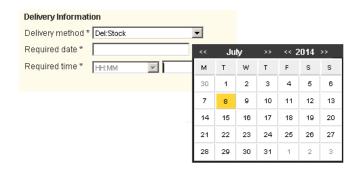
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Additional information will be requested as shown on the screen below. Enter the name of the requesting clinician, click on one of the justifications for a blue light delivery (the system will only allow you to select one). If selecting other type the reason into the free text box. All blue light requests must be accompanied by a telephone call to the hospital services department to inform them that the order has been placed.



Select the delivery date required by clicking on the calendar icon and highlighting the date required or type the date into the required date box in the format dd/mm/yyyy. "Today's" date is highlighted in yellow the required date is highlighted in red. Check the date entered carefully, verify that you have selected the correct month and year.





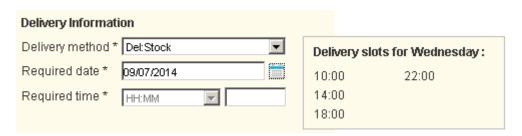
When selecting a date over 15 days in advance the following warning message will be shown:

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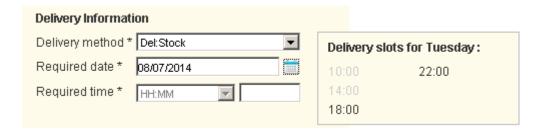


Next, select the delivery time:

For **Del: Stock** a 'delivery slot matrix' will be presented with the delivery times for that day.



If you choose a delivery for today's date, you may find that a delivery slot is 'greyed out', even though that time has not passed. A calculation is made on the time it takes NHSBT to pick and pack the products and the delivery time. This is called the cut off time. E.g. the time now is 12:30pm. The time it takes to pick and pack is 1 hour and the time it takes to deliver from an NHSBT site to the hospital site is 1 hour 15 minutes. Therefore for the 14:00 delivery slot, the cut off time would be 11:45am.



For **Ad Hoc** deliveries, the time will be auto populated using the following calculation

Current time + pick and pack time + delivery time

Therefore if the current time is 13:30, using the pick and pack and delivery times above, the **earliest** NHSBT could deliver that order would be 15:45.

For **Emergency** deliveries, the time will be auto populated using the following calculation

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Author(s): Craig Wilkes

Current time + pick and pack time + emergency delivery time

(NOTE: emergency delivery time will be less than standard delivery time as this will be undertaken using blue lights and sirens).

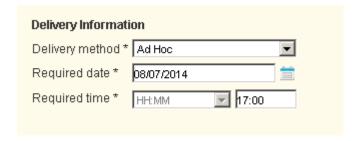
For **Collect** and **Emergency Collect** the time will be auto populated using the following calculation

Current time + pick and pack time

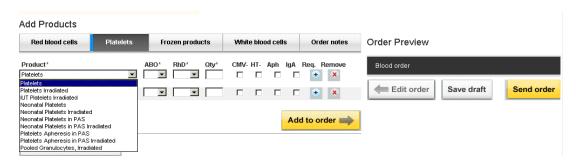
In all cases, above, the suggested time, can be over typed by the user for a time more suited to their needs. This will result in the order obtaining a new delivery type of 'OBOS Late', upon seeing this delivery type the Hospital Services user will be prompted to contact the requesting hospital to decide which delivery type is required to fulfil the order (Del:Stock, Ad Hoc, Emergency etc.)

NOTE: Please be aware that if you start to populate an order and this not completed within 5 minutes causing you to miss the cut of time for that order it will automatically convert to an OBOS Late order. It is recommended that the product selection is completed first with the delivery type and time second.

Please use the time you require the delivery to arrive at your location, not the time it leaves NHSBT or the time you are placing the order.



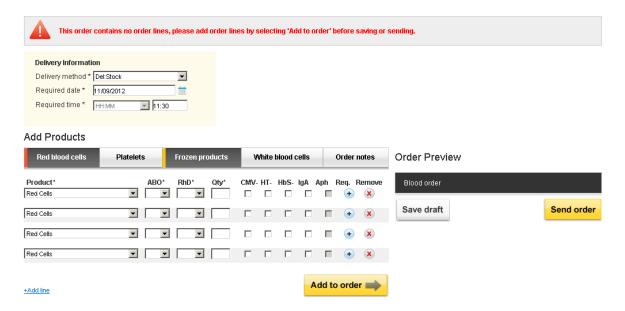
Select the component type required by clicking on the red cell, platelet, frozen products or white blood cells tabs under 'add products'. The order notes tab on this line contains a free text box to add information that applies to the whole order. Enter the product required from the drop down list as shown below.



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For red cells and platelets, the default product will be the standard component. On the drop down list, the standard component is at the top followed by the standard irradiated component the rest of the list will be in alphabetical order.

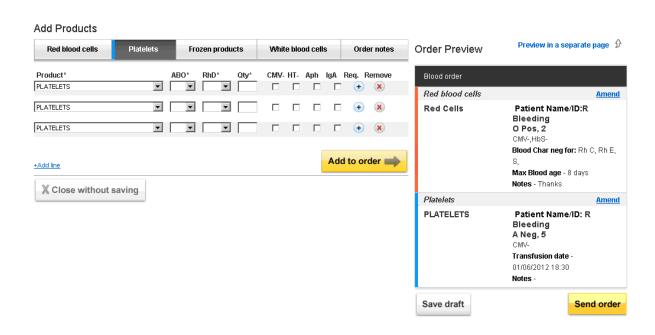
Select the ABO and Rh requirements from the drop down lists and enter a quantity in the Qty\* box as shown below. Additional requirements for CMV, HT, HbS, IgA or Apheresis (Aph) can be added by checking the boxes available. Please be aware that some of these components will be in short supply and should only be requested when absolutely necessary. For some components where these requirements form part of the product specification these boxes may be greyed out and ticked. Where an option is not available the box will be greyed out. Any additional requirements such as phenotyped red cells and date required for platelets can be added using the supplementary screens provided by clicking on the req button • These screens are described later in this section.



The error message in red above will be displayed if a user attempts to send or save an empty order. Once a request line has been completed, it should be added to the order by clicking on the 'Add to order' button. The information for that request line is then shown in the order preview area as shown on the right hand side in the example below. If the information is incorrect then it can be amended by clicking on blue 'Amend' in the order preview screen. The line will then be returned to the 'add products' section and can then be amended by selecting the correct information or removed by clicking on the remove button . Clicking on 'Amend' moves an individual component type back into the Add Products screen so that you can make changes.

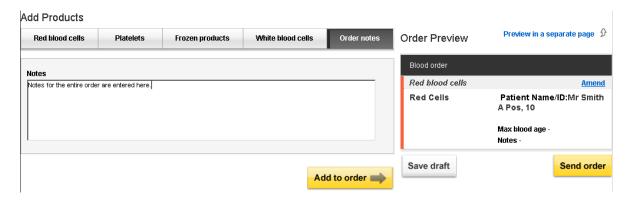
NOTE: Items on the left hand side will NOT be sent, all items must be included on the right hand side.

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Continue to add components as required. If required additional lines can be added by clicking on the blue '+Add line' to the left of the yellow 'Add to order' button. Different component types can be added to the same order. Select the red cell, platelet, frozen products or white blood cells tab as required. Select the product ABO and Rh required from the drop down lists and enter the quantity. Then click on 'Add to order'. To make it easy to identify component types in the order preview area each different component type has a stripe to the left of it in a different colour in the order preview area as shown above. Red cells have a red stripe, platelets blue, plasma yellow and white cells grey.

Order notes may be added for the whole order using the order notes tab. A window opens as shown below and free text can be entered. Notes entered here should apply to the whole order; additional notes sections for each order line are available in the 'Req.' screens.



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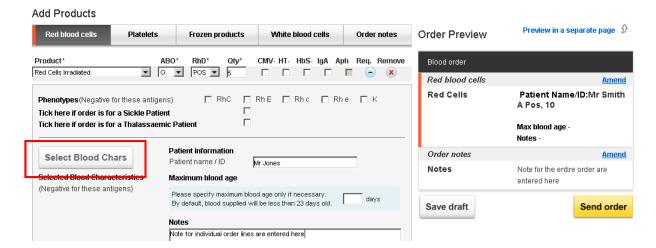
By clicking on the 'Req.' button in each product type a new screen opens which allows additional information to be added. Once data has been added, this screen can be minimised again by clicking on the under req.

Additional information on this screen:

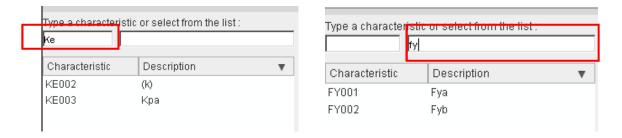
- Red cells phenotype
- Maximum blood age
- Patient details
- Notes specific to the order line
- -For red cell products only tick boxes for:

Thalassaemic Patient Sickle Patient

Clinically significant red cell phenotypes are selected as negative for specific antigens either from the "Phenotypes" row or by clicking on "Select Blood Chars".

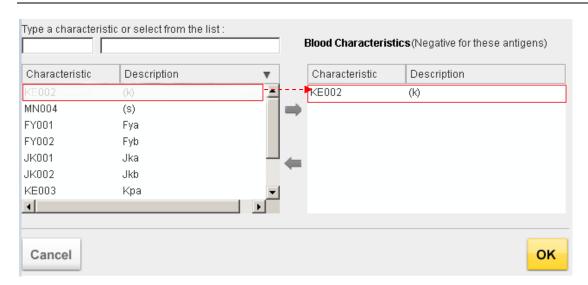


This will open up the phenotypes 'pop-up' box. You can search by either blood char code or blood char description



Select the phenotype you require in the left hand pane, then click the icon to move it across to the right hand pane

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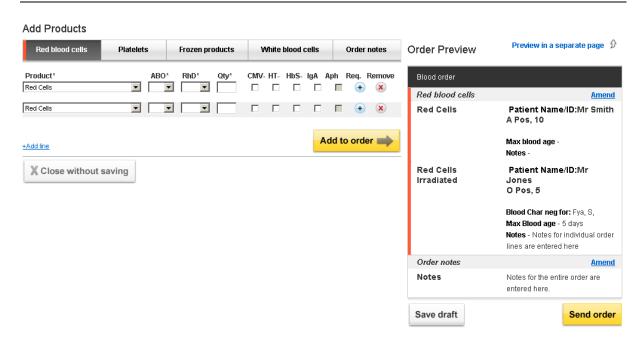


Additional rare phenotypes can be requested via the notes section when there is a definite need.

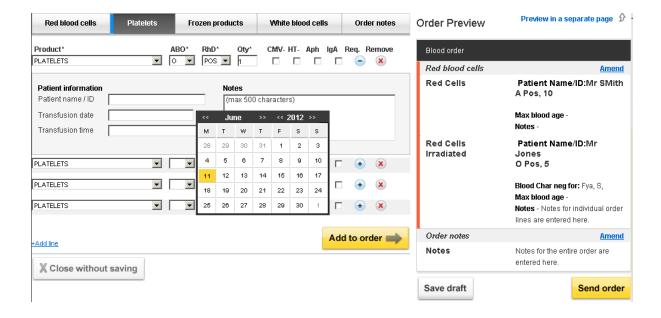
Patient information and notes are free text. Max blood age is the maximum age in days that are acceptable. E.g. entering 6 indicates blood less than 7 days old is required. This should only be requested where essential. Do not enter a max age for components where max age is part of the component specification e.g. the shelf life for exchange units is always within 5 days of the bleed date.

Once the 'add to order' button is clicked any additional information entered will also be displayed in the order preview.

The screen below shows two order lines, one for 10 A+ red cells and one for 5 0+ red cells irradiated with additional phenotype requirements (i.e. negative for Fya and S) and a maximum age of 5 days.



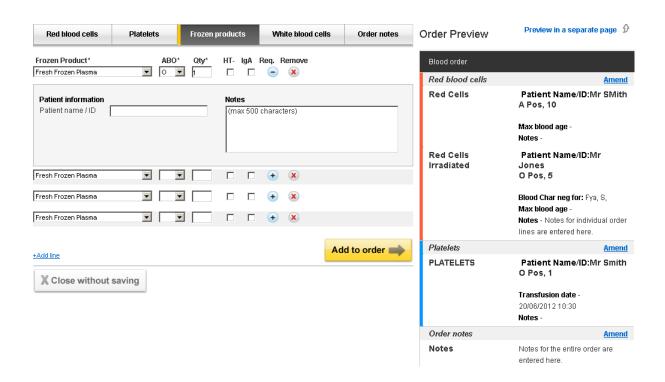
The requirements screens are different for each component type. For platelets there is the option to enter a patient name or ID. Please refer to Trust policy on providing patient identification data and note that the patient name or ID entered will appear on the dispatch note. A transfusion date and time can be entered. If you enter a date you must enter a time and vice versa. Entering the transfusion date and time prevents the issue of platelets that go out of date before the time required.



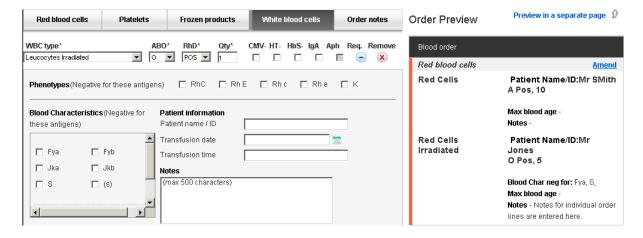
For frozen components the requirements option only offers to record a patient name and free text as shown below. Please note that for frozen components no Rh type needs to be entered. All requests will default to Rh pos when added to the order but Rh neg components may be supplied by NHSBT. This substitution will be automatic

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and will not be accompanied by a telephone call. All other substitutions will be accompanied by a telephone call.

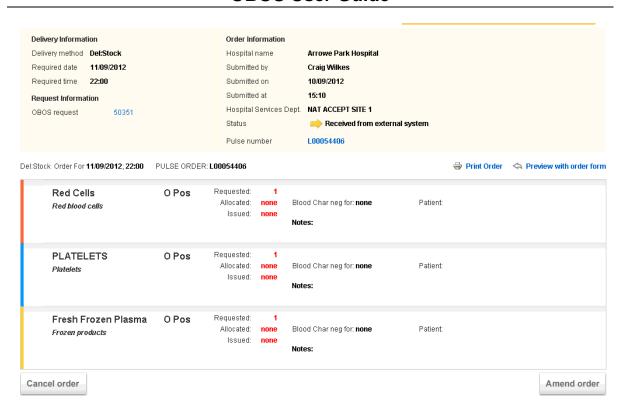


For white cell components the additional requirements screen shown below appears and allows phenotyped information, patient information, transfusion date and time and notes to be added.



At any point by clicking on 'preview in a separate page', it is possible to view the order in a separate window as shown below. Return to the order screen by clicking on 'preview with order form' in blue on the right hand side of the screen.

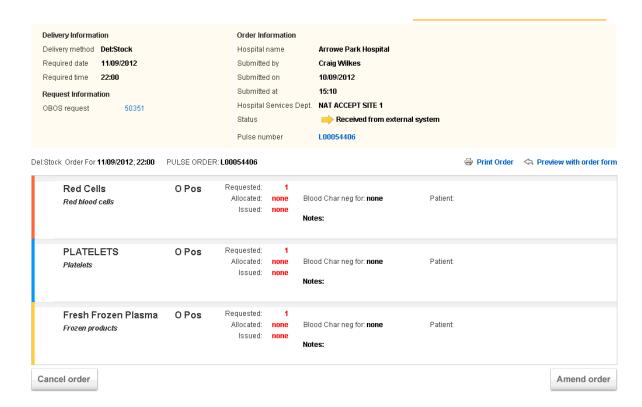
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Once an order is complete then it can be sent to NHSBT by clicking on the 'send order' button, highlighted in yellow under the order preview section. An order confirmation will be received as shown below. This will show both the OBOS request number and the Pulse order number. The blue OBOS and Pulse numbers are active links.



From the confirmation screen, you can click on 'view order details' at the bottom right hand side to check the details as shown below. This screen also has a print order option, which can be used to print out a copy of an OBOS order and fax to Hospital Services if the link between OBOS and Pulse is not working.



# Placing a SSO (Specialist Stock Order) [back to top]

Specialist products

Only to be used for patients approved to receive HLA/HPA selected products

**NOTE:** Ordering HLA/HPA selected products via the SSO tab is only permitted for follow up requests for patients approved to receive these products. For first time orders please contact your NHSBT H&I laboratory.

From Create Order tab select the 'Create a specialist stock order' option



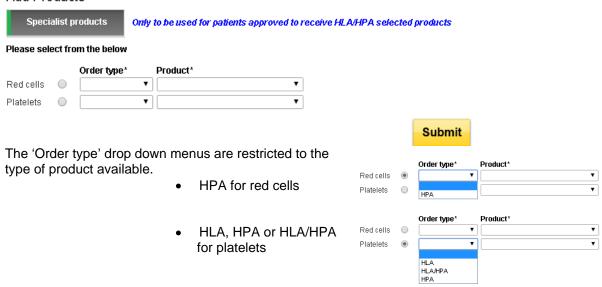
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Complete the delivery method, required date and time

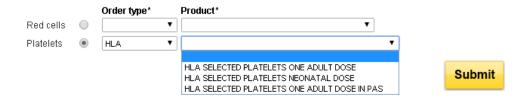


#### Select either Red cells or platelets

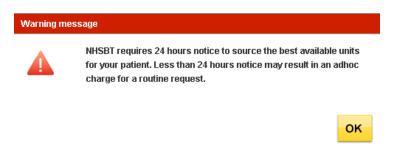
#### Add Products



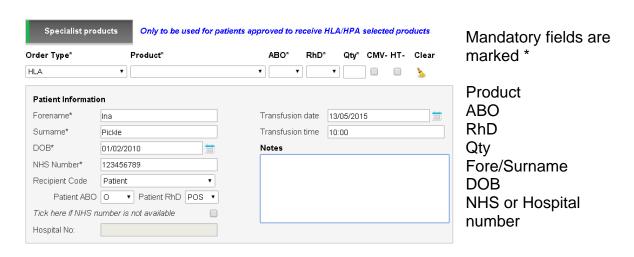
From the 'Product' menu select the product type requested, and press Submit



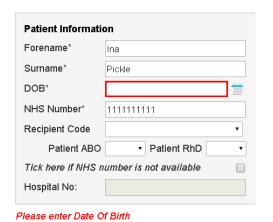
You will see the message below when you press the Submit button highlighting the need for advance notice of orders, select OK to proceed



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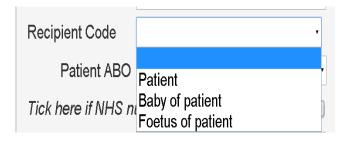


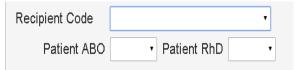
The NHS number is preferred as this is unique to the patient. If the patient does not have an NHS number tick the box stating it is not available, and supply the Hospital number. Other fields are not mandatory but beneficial.



Any mandatory fields missed will be highlighted and need completion before you can proceed

**Note:** Recipient Code, Patient ABO, Patient RhD fields are not mandatory

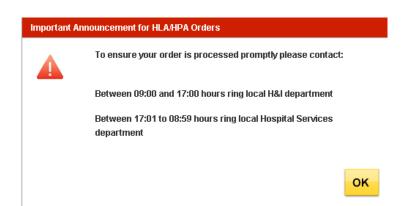




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But are required details when requesting products for a neonate or foetus with out the mandatory details of their own but the mother's details are used

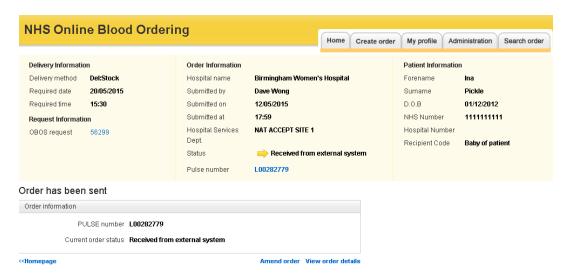
When your order is complete 'Add to Order' will move the details over to the right hand side allowing you to 'Send Order'.



When the order is sent the advisory message will appear, click OK to continue

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An order confirmation will be received as shown below. This will show both the OBOS request number and the Pulse order number. All blue text are active links allowing you to view and amend orders.



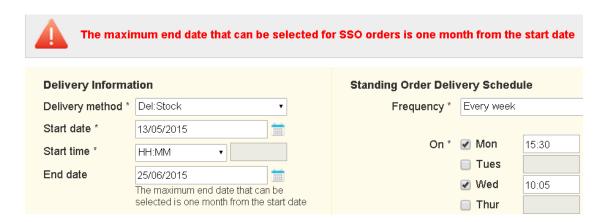
Once an order has been sent it will appear in the current orders tab on the home page between 0 and 14 days before the delivery date dependent on the local configuration. An order will not appear on the home page in advance of 14 days. Progress of an order can be monitored via the home page, see section on monitoring order progress.

#### Specialist Stock Standing Orders [back to top]

Select the option to "Create a Specialist Stock Standing Order" then follow the process for creating a standing order on page 32. The additional patient information will be requested as in a normal specialist stock order described above.

**Note:** Due to the need to review all patients and treatment effectiveness the end date for specialist stock standing orders **can not** be more than one month from the start date.

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# Using OBOS when Pulse is unavailable. [back to top]

If an order cannot be sent to PULSE then it will appear in the queued orders screen accessed via the home page as shown below. This tab has the number of queued orders at any time shown in brackets on the tab heading. On this tab the request number is the OBOS number as no PULSE request number will be allocated whilst the link between Pulse and OBOS is down. Current status will be shown as queued.



OBOS will continue to try to send queued orders to Pulse every few minutes until successful. If a queued request needs to be placed urgently then by clicking on the OBOS request number the OBOS request screen can be accessed as shown below. The 'print order' option can be found on the right hand side of this screen and the printed order can be faxed to Hospital Services to be processed urgently. Faxed orders must be accompanied by a telephone call to ensure hospital services staff has received them. Due to essential regular maintenance OBOS will be unavailable on a Sunday between 01.45 and 02.00.



#### Amending an order once it has been sent [back to top]

Orders can be amended in OBOS until NHSBT have started to allocate components to it. At this point the order becomes locked and the option to amend an order will not be available on the screen. If amendments are still required then these will need to be made by telephoning your local NHSBT Hospital Services Department.

If an order has a delivery type of 'OBOS Late the delivery method, date or time will not be able to be amended until it has been assigned one of the following delivery types by NHSBT Hospital Services:

**Delivery Information** 

**OBOS Late** 

12/05/2015

15:30

Delivery method

Required date

Required time

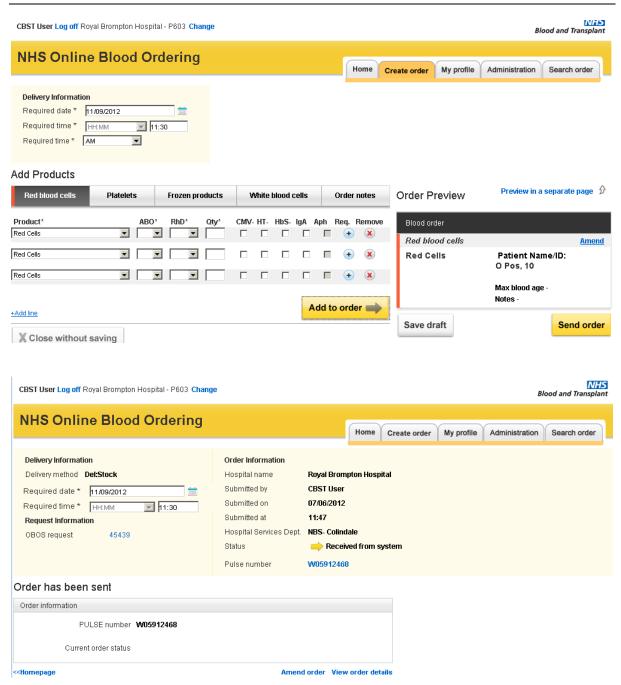
Ad Hoc Emergency Del: Stock Collect

**Emergency Collect** 

It is important to note that any additions to an order are recorded against the PULSE request number and will not be changed in the original OBOS request.

In the example shown in the screenshots below. 10 O pos red cells are ordered generating OBOS request 45439 and Pulse order number W05912468.

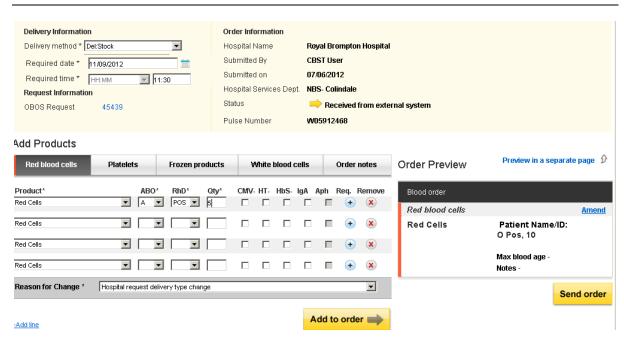
(Template Version 07/10/08)



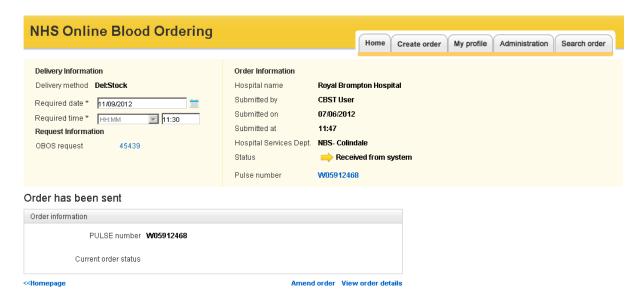
By clicking on 'amend order' at the bottom of the screen the add products screen is reached and 5 A pos red cells are added as shown below. A reason for the change must be selected from the drop down list.

Clicking on 'Amend' moves an individual component type back into the Add Products screen so that you can make changes.

(Template Version 07/10/08)

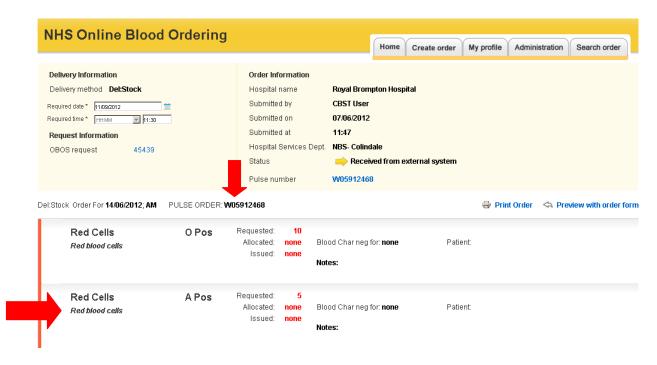


When the amended order is sent the new confirmation received contains the same OBOS and Pulse numbers.

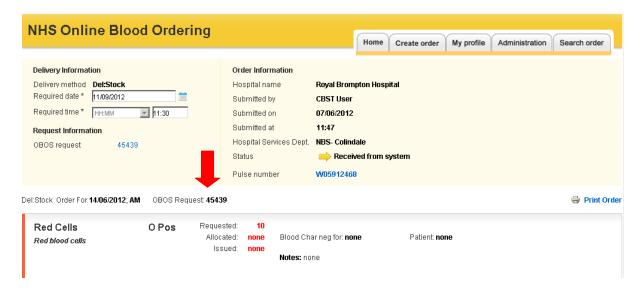


The Pulse order now contains the additional red cells; however the OBOS request retains the original request information. See below.

The Pulse order reflects the changes -

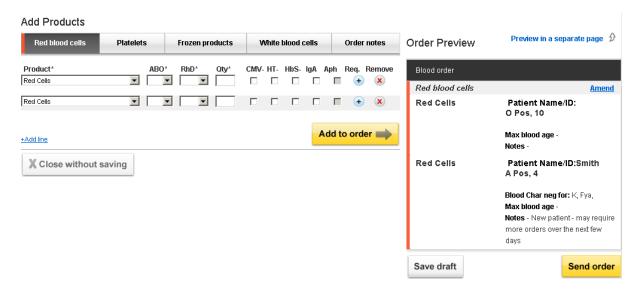


The OBOS request retains the original order details –

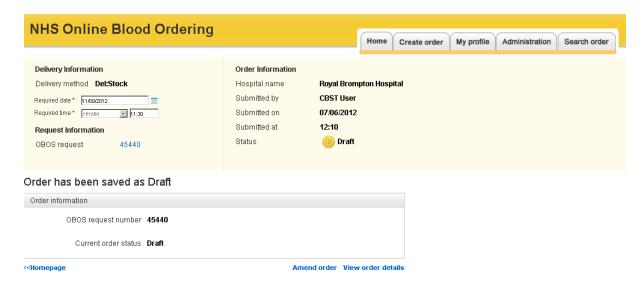


# Saving a request as a draft [back to top]

If a request is compiled in advance of when it is required, additional components may be added later or if you are interrupted in the middle of completing a request then a request may be saved as a draft by clicking on the 'save draft' button to the left of the send order button.



A confirmation screen shown below will appear showing that the order has been saved as a draft.

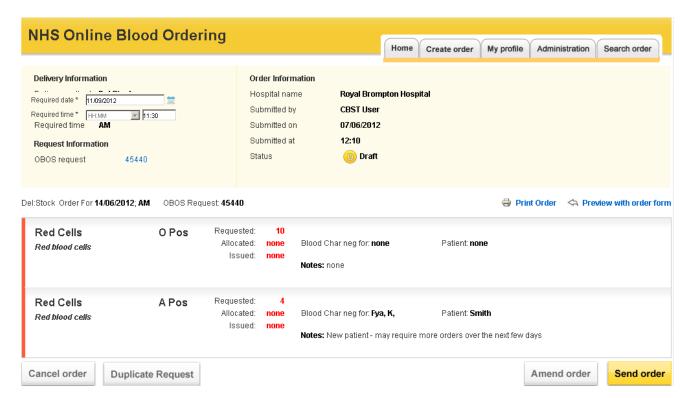


An OBOS request number will be allocated but no Pulse number will be allocated as the order will not have been sent to NHSBT.

Draft orders can be accessed via the draft orders tab on the home screen as shown below. The counter next to draft orders indicates how many draft orders have been saved. To re-enter the order click on the OBOS request number in blue on the left hand side of the screen.

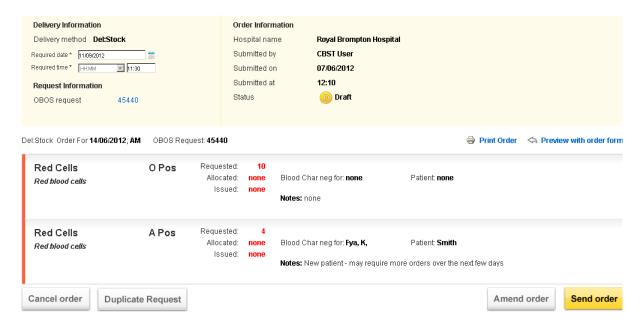


The request can then be amended, duplicated, cancelled or sent as required.



# Duplicating a request [back to top]

It is possible to create a duplicate of a request that has been placed previously. A duplicate request button exists on draft or completed OBOS request screens. Click on the 'duplicate request' button located at the bottom of the screen.



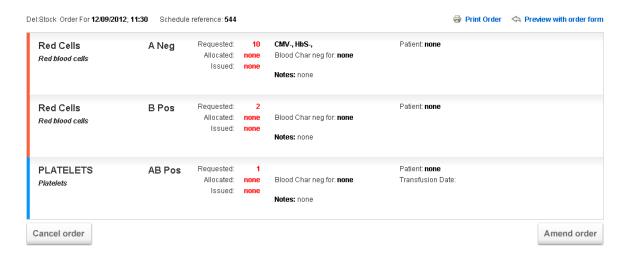
A new request screen will appear as shown below with an information box indicating that some fields, for example date and time required will need to be re-entered. All request lines will need to be edited for any changes to patient details, transfusion dates and notes and re-added to the new order using the 'add to order' button. A yellow surround to the product tab indicates that there are lines in that tab to review. Once all details have been updated and all lines required added the new request can be submitted by clicking on the 'send order' button. This new order will then be allocated a new OBOS request number and a new Pulse order number.



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# Cancelling a request or order [back to top]

Requests or orders can be cancelled on OBOS where the 'cancel order' button appears up to the point at which NHSBT has started to allocate components to it. From this point the cancel order button will not appear and cancellation will have to be telephoned to the Hospital Services department.



#### Creating a Standing order [back to top]

From the home page create order tab select 'create a standing order'.



Select a delivery method and start date, the start time option will be unavailable



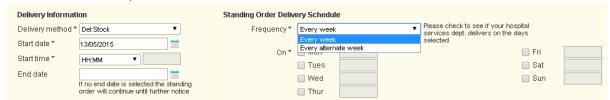
When selecting a date over 21 days in advance the below warning message will be shown.

Effective: 26/07/15

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There is no option to select emergency delivery or emergency collect for a standing order.

In the standing order delivery schedule shown below select either weekly or every alternate week from the frequency drop down list. Please check that routine deliveries are available from your usual schedule for standing orders otherwise ad hoc deliveries may be used



When choosing the **Ad Hoc** or **Collect** delivery types, select the days you wish the standing order to be delivered /collected and manually enter the time for each day.



When choosing the **Del:Stock** delivery type, select the days you wish the standing order to be delivered and select a time from the 'delivery slot matrix'



Select the days of the week that the standing order is required and select any exception dates that you wish to apply by highlighting them using the calendar icon and then use the  $\leftarrow$  arrow to move selected dates into the 'except on' box as shown below.



When a date is moved to the 'Except on' box an alternative date for that specific data can be chosen, i.e. 'Except on' a Bank Holiday Monday could be 'Require on' the following Tuesday.

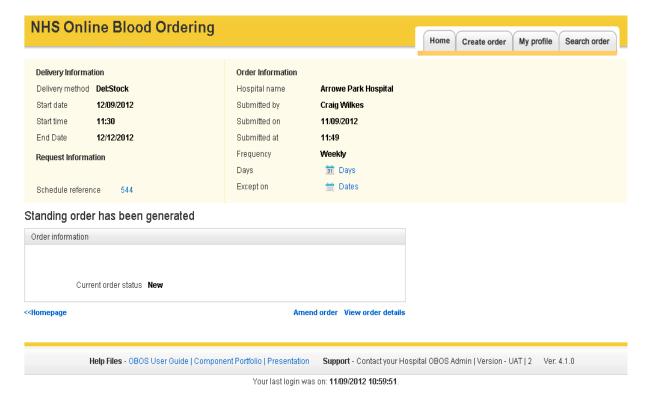
(Template Version 07/10/08)

Dates moved into the in 'except on' box in error can be removed using the  $\rightarrow$  arrow. It is possible to add an end date for standing orders. If no end date is selected the standing order will continue until cancelled by the user.

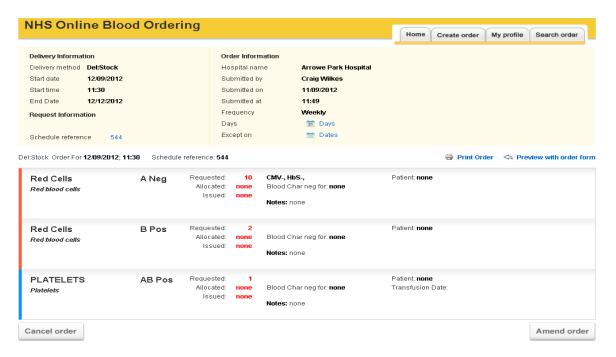
Component request lines, special requirements, patient names and order messages are added to a standing order in exactly the same was as when creating a single order. However there is no option to add a transfusion date and time to components within a standing order as they would only be valid for one instance of the standing order.

Up to three patient names can be displayed on each standing order schedule. If you include more than three patients per schedule the additional names will not be displayed.

Once the order is complete click on 'send order' to register the standing order on OBOS. Note: there is currently no facility so save a standing order as a draft. Once the order has been sent the order confirmation page shows that a standing order has been generated and allows the delivery days and exception dates to be viewed by clicking on the blue icons as shown below. An OBOS schedule reference is listed on the left hand side of the screen.



By clicking on the OBOS schedule reference the detail of the content of the standing order can be viewed. From this screen it is possible to 'print', 'amend' or 'cancel' the standing order.



From the home page standing orders can be viewed using the 'standing order' tab, shown below. The standing order screen will show instances of the standing order that are due in the next three weeks. Standing order schedules which have a start date up to 365 days from current date will now appear on the standing order tab on the home screen. However, delivery dates will only start to populate the schedule within 20 days of the required date OBOS will automatically send an instance of a standing order to Pulse when it becomes due for delivery in three days time (or within the next three days for new standing orders). At this point the next deliveries date will disappear from the Next deliveries section and the order will appear on the current orders section of the home page together with the Pulse order number that has been assigned to it. From this point on, this instance of a standing order can be edited and updated in the same way as stand alone single orders.



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Up to three patient names can be displayed on each standing order schedule. If you include more than three patients per schedule the additional names will not be displayed. Please note Specialist Stock Standing Orders will only cover one patient and their name will not appear on the general standing order page.

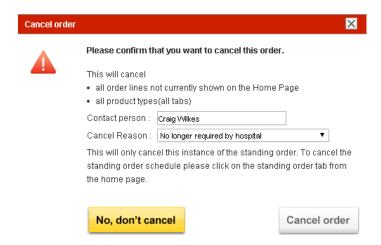
To help identify instances of standing orders that have moved to the home page they will have a standing order icon on the left hand side. By hovering over this icon the original OBOS standing order reference number can be viewed as shown below.



When you view an individual instance of a standing order a live link to the OBOS request, schedule reference and pulse request can be seen. If the individual instance of the standing order is amended then the standing order icon will disappear as the Pulse order is not then the same as the original OBOS standing order request.

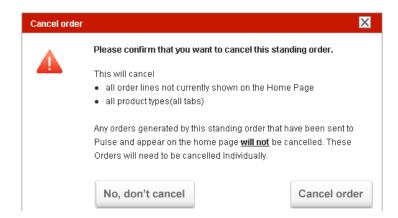
# Cancelling Standing Orders (Partial/Complete) [back to top]

Once a standing order is submitted, the individual instances move over to the home page three days prior to delivery. These can be cancelled via the home page **BUT** only cancels the individual instance. This is highlighted by the below warning screen:



To change or cancel future instances of the standing order changes must be made to the standing order schedule accessed by clicking on 'amend scheduled or ordered products' in blue on this order summary screen. This will cancel all related orders that have not moved to the home screen.

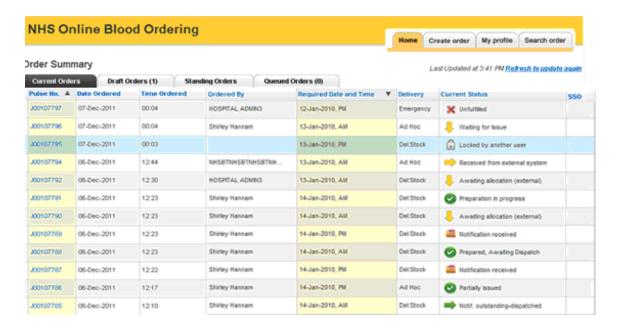
(Template Version 07/10/08)



This will not update any instances that have been allocated a Pulse number and moved to the current orders tab. Once allocated a Pulse number, individual instances of a standing order will need to be amended independently.

#### Tracking orders [back to top]

From the home page it is possible to track the progress of current orders. The screen below shows various stages orders can be at. To view detail of an individual order click on the Pulse number in blue in the left hand column.



There are 14 status messages for current orders shown under the current order status heading:

Received from external system – indicates that NHSBT have received the order and a Pulse order number had been allocated.

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- Awaiting allocation indicates that staff at NHSBT have viewed the order, but have not yet allocated specific donations to fulfil the order.
- √<u>Waiting for issue</u> indicates that units have been allocated to the order but the order has not yet been prepared.
- Partially issued indicates that some components have been issued but the order is not yet complete.
- Locked by another user indicates that staff at NHSBT are currently viewing the order.
- Preparation in progress indicates that staff at NHSBT are currently issuing components to the order.
- Prepared awaiting dispatch indicates that the order is complete but had not yet left NHSBT
- Notif. Outstanding dispatched indicates that the order has been dispatched from NHSBT but the paperwork confirming receipt at the hospital has not been received.
- Notification received indicates that the paperwork has been received by NHSBT and the process is complete. Once orders reach this stage they will no longer appear on the home page but can be searched for using the search function.
- Unfulfilled no components are available to undertake the order.
- Awaiting patient link (SSO) indicates H&I staff have viewed the Specialist stock order, but have not yet linked the order to the NHSBT patient record.
- Awaiting assignment (SSO) indicates H&I staff have not yet allocated specific donations to fulfil the order.
- Awaiting authorisation (SSO) indicates H&I staff have not yet submitted the order to be issued
- To be updated by the hospital indicates the specialist stock order received from OBOS can not be processed. H&I staff have returned the order for it to be amended or cancelled by the hospital. You

A list of OBOS icons and headings is available in appendix two.

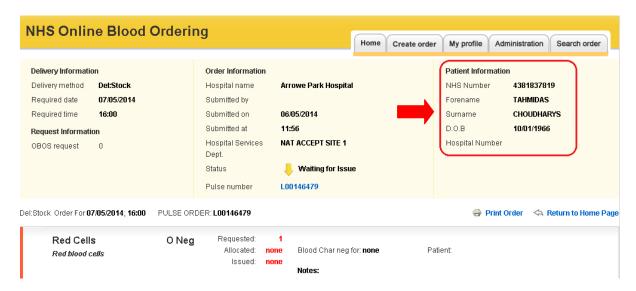
## Tracking 'Specialist Stock Orders' [back to top]

From the home page it is possible to track the progress of Specialist Stock Orders, indicated by the 'SSO' column and the icon. This column can be ordered so that all Specialist Stock Orders appear at the top of the list.

Order	Summary		Last Updated at 1:24 PM Refresh to up	date aqain				
Current Orders Draft Orders (0) Standing Orders Queued Orders (0)								
	Pulse No.	Date Ordered	Time Ordered	Ordered By	Required Date and Time	Delivery	Current Status	sso ▼
	L00146479	06-May-2014	11:56		07-May-2014, 16:00	Del:Stock	Waiting for Issue	*
	L00146045	02-May-2014	09:07		05-May-2014, 12:00	Collect	Awaiting allocation (external)	
	L00139565	01-May-2014	15:44	Admin Admin	01-May-2014, 22:00	Ad Hoc	Awaiting allocation (external)	

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Clicking on the SSO icon or the Pulse number will take you into a **read only** view of that particular order.

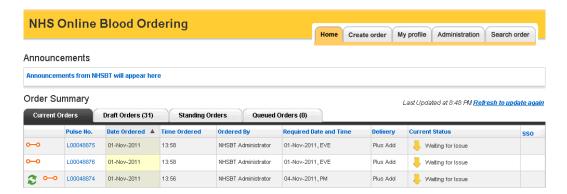


Where patient information exists for that particular Specialist Stock Order, this will be visible in the upper right hand pane.

Specialist Stock Orders not created in OBOS do not have an OBOS number. These specialist stock orders have been created by H&I staff following receipt of a faxed paper order from the hospital.

NOTE: This is a read only view of the order. The order cannot be amended or deleted without contacting NHSBT Hospital Services.

Pulse numbers are listed to the left hand side of the screen. In the far left hand column an icon indicates that an OBOS request has been split by NHSBT into several Pulse orders. This is usually done to facilitate order preparation, either by separating products into different types or by separating products that will not be available until later.

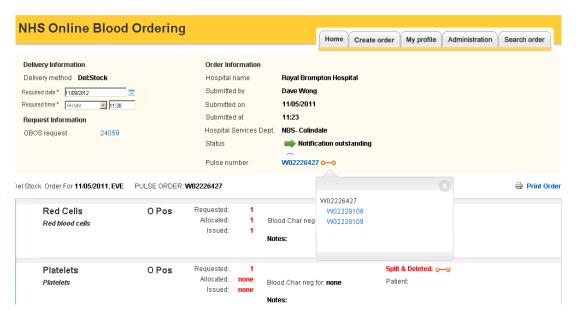


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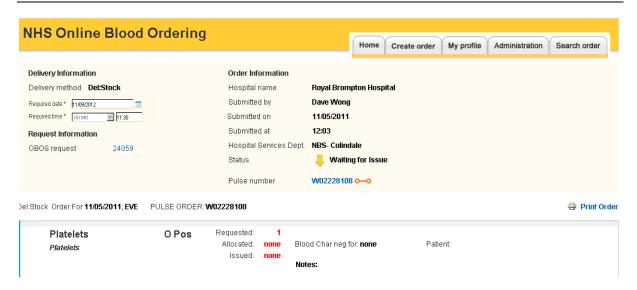
By clicking on the icon the original Pulse order numbers can be viewed. By clicking on the PULSE number coloured blue it is possible to view the order content as in the example shown below.



In the screenshot below you can see that order W02226427 has been split into three, W02226427, W02228108 and W02228109. The red cell ordered remains on order number W02226427 and a component has been allocated to that order line. The platelet request shows as split and re-assigned.



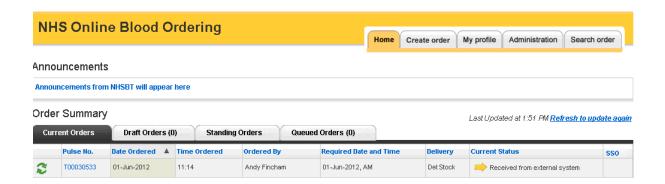
By clicking on the blue links in the pop up box you can navigate to see that the platelet order has been split onto order W02228108 – shown below. All split orders retain the original OBOS request number.



When an order is split in Pulse, the 'split' portion of the order will go back to a status of 'awaiting allocation'. Users will now be able to amend / cancel the order as long as the products have not been allocated in Pulse.

#### Tracking standing orders on the home page. [back to top]

Standing orders are indicated on the home page by the icon  $\stackrel{\checkmark}{\sim}$ . By hovering over this icon the OBOS standing order reference can be viewed, see screen shot below. If a single instance of a standing order is edited via the Pulse order number then this icon will not appear.



#### Using filters on the order summary tabs. [back to top]

The four order summary tabs on the home screen can be arranged using the PULSE number, date ordered, time ordered, ordered by, required date and time, delivery or current status. Click on the blue wording and the " " icon will appear to indicate the filter currently applied is in ascending order, click a second time and the" " icon will appear to indicate the filter is applied in descending order. Filters applied will remain in place until removed even if the user refreshes the screen or logs out and then logs back in again.

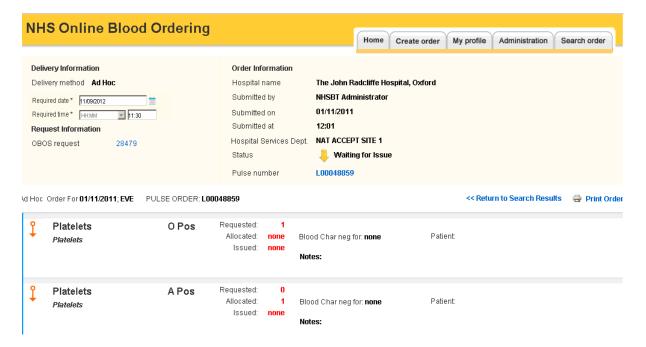


#### Component Substitutions. [back to top]

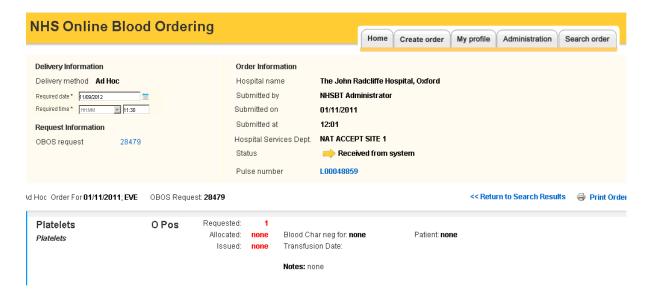
When NHSBT is unable to supply a specific component, substitution of another suitable component will be agreed with the hospital by telephone. Details of the person agreeing the substitution will be held on Pulse and will not be transferred back to OBOS. Hospital staff can enquire by telephone if the name of the person who agreed the substitution is required.

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Order L00048859 is waiting for issue and contains a substitution indicated by the icon. In this example in the first line the O pos platelet requested has not had a component allocated and the second line has an A pos platelet allocated although none was requested.



The original request can be viewed by clicking on the OBOS request number. As shown below this will contain only the information from the original request that was sent to Pulse.

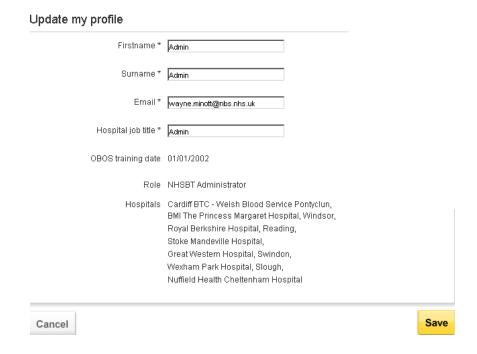


#### Updating options within my profile [back to top]

Two options are offered within the my profile tab, update my profile and update my password.



In the update my profile screen, shown below, hospital users are able to edit and save their first name, surname, e-mail address and job title. Users will need to click on 'save' to update any changes made. Users are not able to change their training date, role or hospitals they are able to access on OBOS. Changes to these items need to be made by a hospital or NHSBT administrator.



In the update my password screen, shown below, hospital users are able to change their password or change the security question that they will be prompted to answer if they forget their password. Both passwords and security question answers are case sensitive. Users will need to click on 'save' to update any changes made.

Update my password						
Username	admin					
Old password *						
New password *						
Confirm New password *	Your password should be:  T-14 characters long  at least one special character  at least one capital letter  at least one number					
Your security question and answe	is required to reset your password if you forget.					
Your security question *	Your security question *   Who do you work for?  Eg: Your Mother's Maiden name?					
Your answer*						
Cancel	Sa	ave				

## Appendix One.

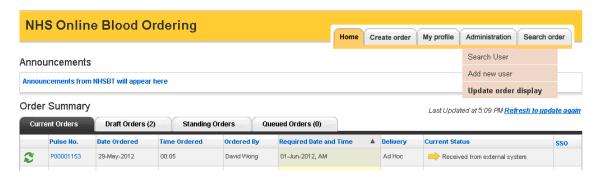
#### Administration.

#### Hospital administrators. [back to top]

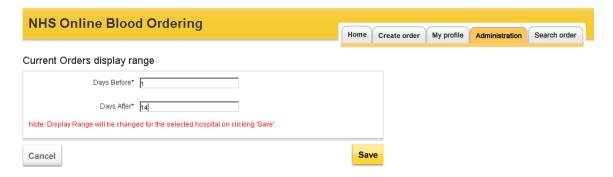
An initial hospital administration account will be set up by NHSBT as part of the go live preparations. The hospital administrator will then be able to set up other hospital administrators and hospital users. Access to this additional functionality is via an administration tab on the home page. It is recommended that hospitals have at least two administrators set up so that they can re-set one another's accounts if they become locked.

### Updating Order Display. [back to top]

Hospital Administrators can configure the length of time orders can be seen on the home page pre and post "today's" date. The maximum time in advance that orders can be seen is 14 days and the maximum range from pre to post "today's" date is 15 days. There is a new option to "Update order display" on the administration tab.



Selecting "Update order display" brings up the following screen



Enter "Days Before" and "Days After" the current date as appropriate. Please note standing orders are still only sent to Pulse 3 days before the delivery date and their appearance on the OBOS Home page from this point will be dictated by the local configuration.

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A warning will appear for orders placed 15 days or more in advance

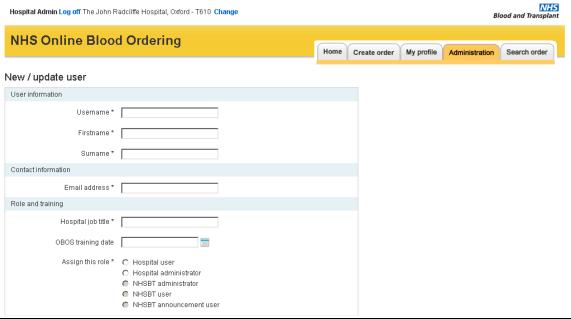


### Adding new users [back to top]

From the home page administration tab select 'Add new user'

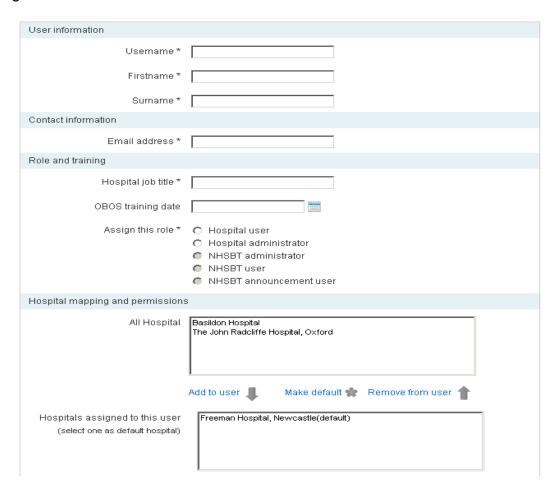


Enter the user information, contact information, role and training date. Hospital administrators will be able to assign a role of either hospital user or hospital administrator.



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A list of hospitals that can be assigned to this user will appear in the box at the bottom of the screen. This will include all hospitals that the administrator has access to. This hospital list is administrated by NHSBT administrators and if this list is incorrect please contact NHSBT. Use the  $\uparrow$  and  $\checkmark$  to add the required hospitals for the user. Where multiple hospitals can be viewed there are two possible options at log in.

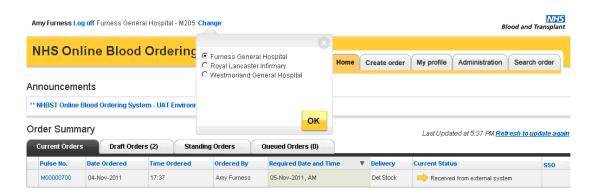


Highlighting a hospital from the 'hospitals assigned to the user' and click on 'make default 'to assign a default hospital. This will be the hospital site accessed when logging in. To access the other hospitals available to them they will need to click on change in blue at the top of the screen (shown below).

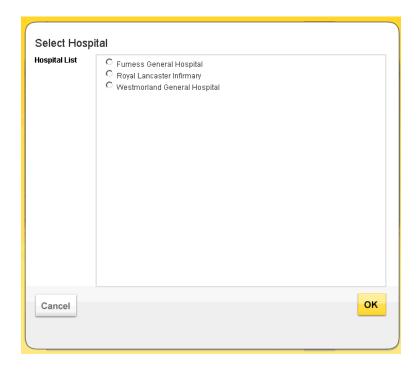
To change which hospital is the default site

- Highlight the hospital that is set as "(default)" and click on "Remove from user", this will
  move the selected hospital into the upper "All Hospital" box.
- Highlight the hospital you've just moved to the "All Hospital" box and click on "Add to User". Both hospitals will now appear in the "Hospitals assigned to this user" box but neither will be default.

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If no default hospital is entered then at logging the first screen the user will be shown will be a screen asking them to select the hospital they wish to see and order for (shown below). To set the user up with no default hospital assign all the hospitals. The first hospital assigned will appear as default, remove this default hospital from the list then reassign the hospital.



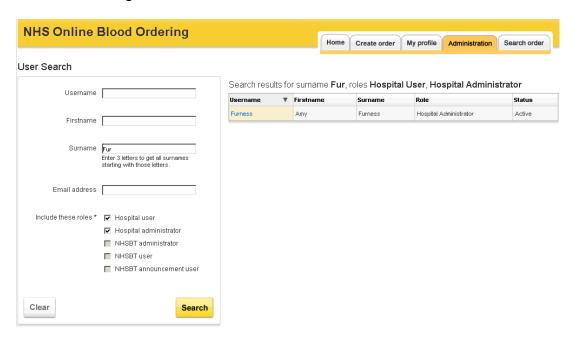
Once all details have been entered click on 'save' at the bottom of the new/updated user screen to complete the process. A message will be received to say that the user was successfully created.

#### Searching for users. [back to top]

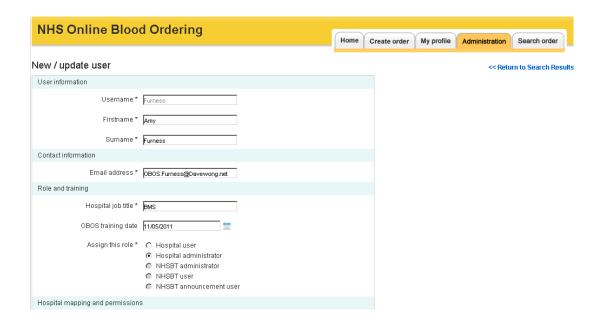
By selecting search user from the administration tab the screen shown below can be accessed. Users can be searched for by Username, first name and surname or email address and ticking "Hospital user" and "Hospital administrator". The NHSBT

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administrator, user and announcement user searches are greyed out for hospital administrators. A list of all users and/or administrators for a particular hospital can be viewed by ticking "Hospital user" and/or "Hospital administrator" and selecting "Search" as long as the other fields are left blank.

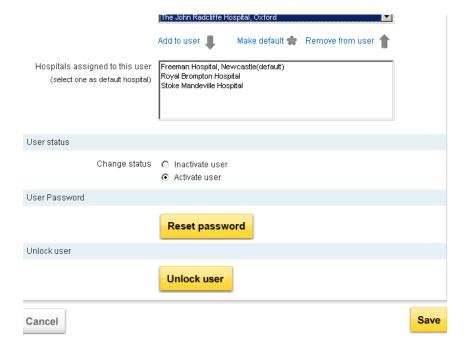


The user's information screen can be opened for editing by clicking on the username in the search results on the right hand side of the screen. This opens the New/update user screen shown below. There is an option to "Return to Search Results" on the right-hand side. Information can be edited and then saved by clicking on 'save' at the bottom of the New/ updated user screen.



### Activating/Inactivating accounts and resetting passwords. [back to top]

At the bottom of the new/update user screen shown below there is an option to inactivate or activate users, to reset a user's password and to unlock a user who has locked themselves out of the system. Make the changes required and click on the relevant 'reset' 'unlock' or 'save' buttons to make the changes. Please note it is important to inactivate accounts when a member of staff leaves or retires. A username can never be deleted from the system because you need to maintain the audit of "who did what and when" but you should prevent staff who no longer work for you ordering on your behalf.

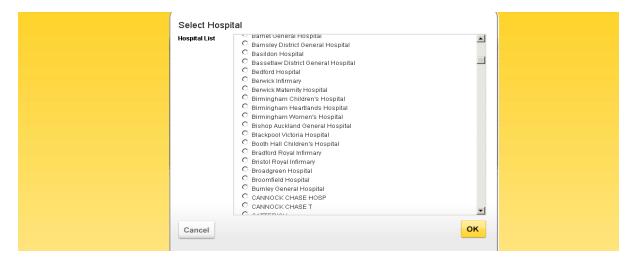


#### NHSBT administrators. [back to top]

There are three levels of administration role within NHSBT:

'NHSBT administrator' is an overview role limited to only one or two key NHSBT staff. 'NHSBT users' have the ability to set up new accounts for hospital staff, unlock users, re set passwords and add bank holidays and announcements. 'NHSBT announcement user' has the ability to update the announcement message only.

At login NHSBT administrators and NHSBT users will be provided with a screen showing all hospitals currently available on OBOS. To add hospital administrators select the hospital which requires the new administrator to be added. Where the hospital administrator will have access to more than one hospital any one of the hospitals they will use can be selected to set up the account.



You will be taken to the hospitals home page where you can select from four administration functions shown below. Search user and add new user functionality is the same as described for hospital administrators.



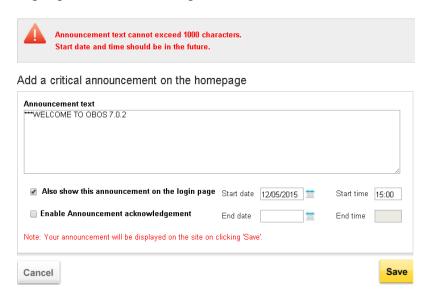
#### Adding an announcement to OBOS [back to top]

To add an announcement to the log in screen and home page select the 'add announcement option' from the administrator tab. The screen shown below will open. Type the announcement into the announcement text box. Tick the box 'also show this announcement on the homepage'. You can set up announcements so that the first time a user logs in after an announcement has been posted they must

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acknowledge it. To use this functionality tick the box 'Enable Announcement Acknowledgement'

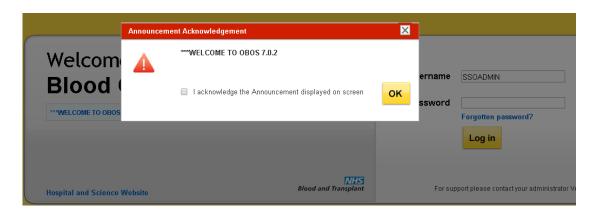
Announcements require a 'Start date/time' and an 'End date/time' Select the required dates using the calendar icon and highlighting the required dates or type the dates into the date boxes in the format dd/mm/yyyy. Time should be entered (using 24 hour clock) as shown below. Announcements can not exceed 1000 characters, excess will be highlighted when clicking 'Save'



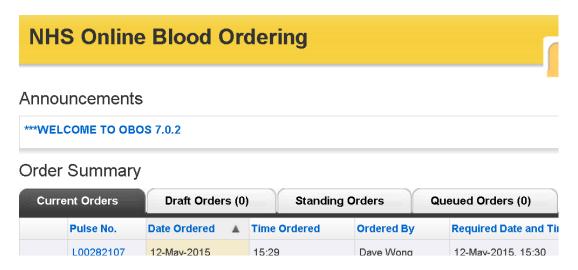
A message confirming the announcement has been saved will be shown. Log out and check that the announcement appears on the login screen:



Log back in. If you have enabled 'announcement acknowledgement' you will see the following screen:

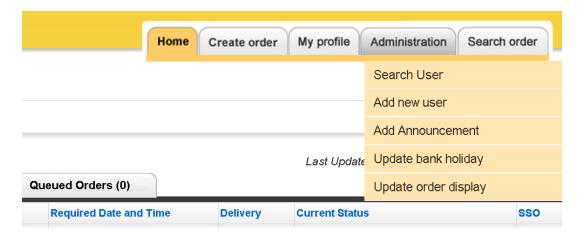


Acknowledge the announcement and then check that the it appears on the home page:



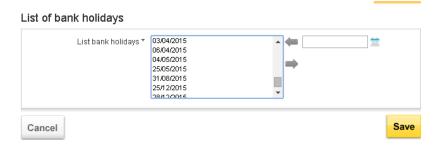
### Updating Bank holidays. [back to top]

From the home screen administration tab select update bank holidays. This will update the whole system regardless of which hospital you are currently logged into.



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A screen showing a list of bank holidays will open.



To add a date to the bank holiday list use the calendar to highlight the date and the ← arrow to move selected dates into the list bank holidays box as shown below. Any dates which need to be removed can be removed using the → arrow.



Once dates have been updated click on 'save'. A confirmation message will be shown to indicate that the bank holidays have been saved successfully.

## Appendix Two [back to top] Icons used in the OBOS system

Order Status	Icon
Draft	D
Pending	
Queued	0
Received from OBOS	<b>⇒</b>
Awaiting Allocation	<b>↓</b>
Part Allocated	<b>.</b>
Waiting for issue	•
Awaiting patient link (SSO)	•
Awaiting assignment (SSO)	<b>.</b>
Awaiting authorisation (SSO)	<b>.</b>
To be updated by hospital	<del>-</del>
Partially issued	
Prepared awaiting dispatch	
Dispatched	<b>⇒</b>
Notification Received	
Locked by another user	
Preparation in progress	<b>⊘</b>
Deleted/Cancelled	<b>8</b>
Unfulfilled	×

# Icons used in the OBOS system

Across the application	Icon
Standing orders	2
Linked Order	9
Substitution	1
Success Message	
Error Message	
Information Message	1
Print Order	<b>=</b>
Expand Order Line	•
Collapse Order Line	-
Remove Order Line	×
Preview with order form	⇔
Background Processing	
Specialist Stock Order	*